

Module 3: Location

Goal: Get every detail a tech needs to find the job, get in, and reach the right person on site.

About 7 minutes

All names, phone numbers, addresses, and companies in this lesson are made-up examples. They are marked "(example)".

Why This Matters to the Employer

A tech who can't find the job isn't working. Neither is a tech stuck at a locked gate or waiting for someone who isn't there. Every lost minute costs the company money and makes the customer wait. A few good questions on the phone save a lot of driving and waiting.

Get the Full Job Address

"I'm on Main Street" isn't an address. Get all of it:

- Street number and street name
- Unit, suite, apartment, or building number
- City and ZIP code
- Cross street or landmark, if it's hard to find

Then **read it back**. "That's 123 Example Ave, Unit 4B, San Diego, 92108?" Spell out street names that could be confused.

Job address vs. billing address: These can be different. A landlord may live across town. A business may pay from a head office. Ask: "Is this where the work is, and is it also where we send the bill?"

Ask About Access

Getting to the address is half the job. Getting *in* is the other half. Ask:

- **Gates:** "Is there a gate code?"
- **Lockbox:** A small locked box that holds a key. "Is there a lockbox? What's the code?"
- **Parking:** "Where can the tech park? Is there a loading area?" Work trucks are big.
- **Entry:** "Which door should the tech use?"
- **Pets:** "Any dogs or pets we should know about?"
- **Equipment spot:** "Where is the unit, panel, or water heater? Attic, roof, garage, crawl space?"
This tells the tech if they need a ladder or extra time.

Get a Site Contact

The person calling may not be the person at the job. A property manager may call from an office. A homeowner may be at work. Ask:

- "Who will be there to let the tech in?"
- "What's their name and best number?"

Read the number back. Put the site contact in the ticket, separate from the caller.

Business and Job Sites

Businesses and construction sites often have extra rules. Ask:

- "What hours is the site open?"
- "Does the tech need to check in somewhere, like a front desk or site trailer?"
- "Is any safety gear required on site?"
- "Is there a work area that's off-limits during business hours?"
- "Who is the superintendent on site, and what's their number?"

Write the answers in the ticket so the tech can plan.

Keep Codes Private

Gate codes and lockbox codes are like house keys. Treat them that way.

- Put them only where the tech can see them, like the ticket's access field.
 - Don't put them in group emails or texts to the whole office.
 - Don't read them out loud in a busy room.
 - If a code changes, update the ticket right away.
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Do This, Not This

Instead of this...	Do this...
Write down "Main St"	Get the full address with unit, city, and ZIP, and read it back
Assume the caller will be at the job	Ask, "Who will be there to let the tech in?"
Email the gate code to the whole team	Put the code only in the ticket's access field

Example Scenario

EXAMPLE SCENARIO. All names and numbers are made up.

Chris: Thanks for calling Example Heating & Air (example), this is Chris. How can I help?

Caller: Hi, this is Dana Brooks (example). I manage a building. The hallway lights on the second floor are out.

Chris: Thanks, Dana. What's the best number for you?

Caller: (619) 555-0125.

Chris: (619) 555-0125. Got it. Is anything sparking or smelling like it's burning?

Caller: No, just dark.

Chris: Okay. What's the building address?

Caller: 123 Example Ave (example), San Diego.

Chris: Is there a unit or building number?

Caller: The maintenance office is Unit 4B. The dark hallway is on the second floor.

Chris: And the ZIP code?

Caller: 92108.

Chris: Let me read that back. 123 Example Ave, Unit 4B, San Diego, 92108. Is that right?

Caller: That's right.

Chris: Will you be on site?

Caller: No, I'm at our main office. Luis (example) does maintenance there.

Chris: What's Luis's number?

Caller: (619) 555-0158.

Chris: (619) 555-0158. Is there a gate code?

Caller: Yes, 4-2-1-9 (example).

Chris: 4-2-1-9. I'll put that in the ticket's access field. Where should the tech park?

Caller: Visitor spots by the front. Trucks can use the back lot.

Chris: And where's the electrical panel for that floor?

Caller: Luis will know. I think it's in a closet by the stairs.

Chris: Great. Should the bill go to you or to the building?

Caller: To me, at our main office.

Chris: Got it. I'll get an electrician scheduled and call you back with a time.

What went right: Chris got the full address with the unit and ZIP, read it back, separated the caller from the site contact, got the gate code and read it back, got parking, asked where the panel was, and checked where the bill goes. Without asking, the tech would have called Dana, who wasn't even

there.

Quick Tips

- Full address: number, street, unit, city, ZIP. Read it back.
- Ask if the job address and billing address are the same.
- Ask about gates, lockboxes, parking, entry door, and pets.
- Ask where the equipment is: attic, roof, garage, crawl space.
- Get a site contact name and number, even if it's the caller.
- Businesses and job sites: ask about hours, check-in, and safety gear.
- Codes are private. Ticket only, never group emails.

Quiz

1. Why ask for a site contact if you already have the caller's number?

- a) In case the caller doesn't pay
- b) The caller may not be at the job
- c) It's not needed

Answer: b. The tech needs someone on site to let them in and answer questions.

2. Which is a complete job address?

- a) "Example Ave, near the store"
- b) "123 Example Ave"
- c) "123 Example Ave, Unit 4B, San Diego, 92108"

Answer: c. It has the number, street, unit, city, and ZIP, so the tech goes to the right door.

3. Where should a gate code go?

- a) In the ticket's access field, where the tech can see it
- b) In an email to the whole office
- c) On a sticky note on your monitor

Answer: a. Codes are like keys. Share them only with the people who need them.

4. Why ask where the equipment is, like the attic or roof?

- a) To make small talk
- b) So the tech knows if they need a ladder or extra time
- c) For billing

Answer: b. It helps the tech bring the right gear and plan the time.

5. A caller is a landlord who lives in another city. What should you ask?

- a) Nothing, just use their home address
- b) "Is the job address different from where we send the bill?"
- c) "Can you be at the job yourself?"

Answer: b. Job and billing addresses are often different. Get both right.